



## **COURSE OVERVIEW IT0023** **ChatGPT for Excel**

### **Course Title**

ChatGPT for Excel

### **Course Date/Venue**

Session 1: July 13-17, 2025/Tamra Meeting Room, Al Bandar Rotana Creek, Dubai UAE

Session 2: October 13-17, 2025/Glasshouse Meeting Room, Grand Millennium Al Wahda Hotel, Abu Dhabi, UAE



### **Course Reference**

IT0023

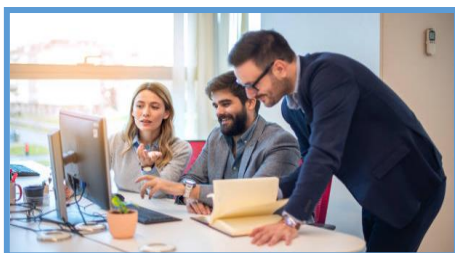
### **Course Duration/Credits**

Five days/3.0 CEUs/30 PDHs

### **Course Objectives**



***This highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using the “MS Excel” application.***



This course is designed to provide participants with a detailed and up-to-date overview of ChatGPT for Excel. It covers the ChatGPT and its capabilities in Excel, setting ChatGPT for Excel and generating and formulas using ChatGPT; the data cleaning and formatting and automating repetitive tasks with ChatGPT; using ChatGPT for pivot table automation and generating advanced Excel charts with AI; the ChatGPT for financial analysis and forecasting; and generating custom Excel reports with ChatGPT.



Further, the course will also discuss the macros and VBA, generating VBA code with ChatGPT and automating data entry and data processing; the ChatGPT for advanced Excel automation, debugging and optimizing Excel code; automating emails and reports with AI and using ChatGPT to generate Excel task reminders; the ChatGPT for HR and employee management in Excel and sales and marketing automation; the AI for supply chain and inventory management; and the ChatGPT for customer support and data management.

During this interactive course, participants will learn the regression models for data prediction, automating trend detection using AI and implementing predictive analytics in Excel; the AI-driven KPI analysis in Excel, automating financial modeling using ChatGPT and using ChatGPT for competitive analysis reports; integrating AI-generated Excel reports with Power BI; and automating client reporting with ChatGPT.

### **Course Objectives**

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain an in-depth knowledge on ChatGPT for excel
- Discuss ChatGPT and its capabilities in excel, set-up ChatGPT for excel and generate and explain excel formulas using ChatGPT
- Use ChatGPT for data cleaning and formatting and automate repetitive tasks with ChatGPT
- Analyze data with ChatGPT, use ChatGPT for pivot table automation and generate advanced excel charts with AI
- Apply ChatGPT for financial analysis and forecasting and generate custom excel reports with ChatGPT
- Identify macros and VBA, generate VBA code with ChatGPT and automate data entry and data processing
- Apply ChatGPT for advanced excel automation, debugging and optimizing excel code
- Automate emails and reports with AI and use ChatGPT to generate excel task reminders
- Use ChatGPT for HR and employee management in excel and sales and marketing automation
- Apply AI for supply chain and inventory management and ChatGPT for customer support & data management
- Use regression models for data prediction, automate trend detection using AI and implement predictive analytics in excel
- Discuss AI-driven KPI analysis in excel, automate financial modeling using ChatGPT and use ChatGPT for competitive analysis reports
- Integrate AI-generated excel reports with power BI and automate client reporting with ChatGPT

### **Exclusive Smart Training Kit - H-STK®**



*Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.*

### Who Should Attend


This course provides an overview of all significant aspects and considerations of ChatGPT for Excel for business analysts and data analysts, finance and accounting professionals, operations and project managers, sales and marketing professionals, HR and administrative staff, small business owners and entrepreneur and other technical staff.

### Course Certificate(s)


Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours

### Certificate Accreditations

Certificates are accredited by the following international accreditation organizations: -

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.
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The International Accreditors for Continuing Education and Training (IACET - USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.





### Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



**Dr. Chris Le Roux, PhD, MSc, BSc, PMI-PMP** is a **Senior Project & Management Consultant** with over **30 years** of teaching, training and industrial experience. His expertise lies extensively in the areas of **Information Technology, Excel Report Automation with ChatGPT, ChatGPT for Creating Training Material in Excel, IT Business Case Fundamentals, Social Media Platforms, Instant Messaging, IT Risk Management Concepts, IT Risk Management Standard Approaches, IT Risk Identification, IT Risk Monitoring & Control, Web Applications & Services, Network Security, IP Security** in an Information Society, **Cabling Systems, Frequency Management, Joint Operations Intelligence and Information Systems, Network**

**Administration, Intelligence Software, Microsoft Office Advanced Courses (Excel, Access, Outlook), Data Base, Networking, Security Systems, Communication Equipment, Information Technology Management and Information Analysis.** Further, he is also well-versed in **Project & Contracts Management Skills, Project & Construction Management, Project Planning, Scheduling & Control, Project Management, Project Delivery & Governance Framework, Project Management Practices, Project Management Disciplines, Project Risk Management, Risk Identification Tools & Techniques, Project Life Cycle, Project Stakeholder & Governance, Project Management Processes, Project Integration Management, Project Management Plan, Project Work Monitoring & Control, Project Scope Management, Project Time Management, Project Cost Management, Project Quality Management, Quality Assurance, Project Human Resource Management, Project Communications Management, Contract Management, Tender Development, Contract Standards & Laws, Dispute Resolution & Risk Identification, Creative Thinking & Problem-Solving Techniques, Emotional Intelligence, Presentation Skills, Communication & Interpersonal Skills, Effective Communication & Influencing Skills, Effective Business Writing Skills, Writing Business Documents, Business Writing (Memo & Report Writing), Leadership & Team Building, Psychology of Leadership, Interpersonal Skills & Teamwork, Coaching & Mentoring, Innovation & Creativity, Office Management & Administration Skills, Controlling Your Time & Managing Stress, Crisis Management, Strategic Human Resources Management, Change Management, Negotiation Skills, Strategic Planning, Risk Analysis & Risk Management, Global Diverse & Virtual Teams Operation, Exceeding Customer Expectations, Corporate Governance Best Practice, Business Performance Management & Improvement, Building Environment of Trust & Commitment, Win-Win Negotiation Strategies, Quality Improvement & Resource Optimization, Neuro Linguistic Programming (NLP), Personal Resilience Developing, Effective Role Modelling & Development, Managing Dynamic Work Environments, Organizational Development, Career Management, Situation & Behaviour Analysis, Interpersonal Motivation Skills, Inventory Management and Financial Administration.** Further, he is also well-versed in **Water Supply System Security, Vulnerability & Terrorism, Integrated Security Systems, Incident Threat Characterization & Analysis, Physical Security Systems, Security Crisis, Security Emergency Plan, Command & Control System, Preventive Actions and Situation Analysis.** He was the **Psychologist & Project Manager** wherein he was responsible in the project management and private psychology practices.

During his career life, Dr. Le Roux has gained his academic and field experience through his various significant positions and dedication as the **Director, Medico Legal Assessor Psychologist, Training & Development General Manager, Project Manager, Account Manager, Commercial Sales Manager, Manager, Sales Engineer, Project Specialist, Psychology Practitioner, Senior HR Consultant, Senior Lecturer, Senior Consultant/Trainer, Business Consultant, Assistant Chief Education Specialist, ASI Coordinator, Part-time Lecturer/Trainer, Team Leader, Departmental Head, Technical Instructor/Qualifying Technician, Apprentice Electrician: Signals and Part-Time Electrician** from various companies and universities such as the **South African Railway (SAR), Department of Education & Culture, ESKOM, Logistic Technologies (Pty. Ltd), Human Development: Consulting Psychologies (HDCP) & IFS, Mincon**, just to name a few.

Dr. Le Roux has a **PhD in Commerce Major in Leadership in Performance & Change**, a **Master degree in Human Resource Management**, a **Bachelor degree (with Honours) in Industrial Psychology**, a **National Higher Diploma** and a **National Technical Diploma**. Further, he is a **Certified Project Management Professional (PMI-PMP)**, a **Certified Scrum Master Trainer** by the **VMedu**, a **Certified Instructor/Trainer** and a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management (ILM)**. Moreover, he is a **Registered Industrial Psychologist** by the **Health Professions Council of South Africa (HPCSA)** and a **Registered Educator** by the **South African Council for Educators (SACE)**. He has further delivered numerous trainings, courses, seminars, conferences and workshops globally.

### Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

- 30% Lectures
- 20% Practical Workshops & Work Presentations
- 30% Hands-on Practical Exercises & Case Studies
- 20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

### Course Fee

**US\$ 5,500** per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

### Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

### Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

#### **Day 1**

0730 – 0800	<i>Registration &amp; Coffee</i>
0800 – 0815	<i>Welcome &amp; Introduction</i>
0815 – 0830	<b>PRE-TEST</b>
0830 – 0930	<b><i>Understanding ChatGPT &amp; Its Capabilities in Excel</i></b> <i>What is ChatGPT &amp; How it Works • How ChatGPT Enhances Excel Productivity • Use Cases of ChatGPT in Excel (Automation, Data Analysis, VBA) • Limitations &amp; Challenges of AI in Excel</i>
0930 – 0945	<i>Break</i>
0945 – 1030	<b><i>Setting Up ChatGPT for Excel</i></b> <i>Accessing ChatGPT via OpenAI API • Integrating ChatGPT with Excel Using VBA • Using Third-Party Excel Plugins for AI Assistance • Basic Setup for Automation Workflows</i>
1030 – 1130	<b><i>Generating &amp; Explaining Excel Formulas Using ChatGPT</i></b> <i>How ChatGPT Generates Excel Formulas • Understanding Formula Syntax &amp; Functions • Using ChatGPT to Debug &amp; Correct Excel Formulas • Converting Natural Language Queries into Formulas</i>
1130 – 1230	<b><i>ChatGPT for Data Cleaning &amp; Formatting</i></b> <i>Automating Data Entry Corrections • Removing Duplicates &amp; Inconsistencies • Formatting Dates, Numbers &amp; Text • Handling Missing Data Using AI</i>
1230 – 1245	<i>Break</i>
1245 – 1330	<b><i>Automating Repetitive Task with ChatGPT</i></b> <i>Using ChatGPT to Generate Macros for Automation • Automating Email Reports &amp; Data Updates • Creating Customized Excel Functions Using AI • Enhancing Efficiency with AI-Powered Automation</i>



1330 - 1420	<b>Hands-On: Generating Dynamic Excel Formulas with ChatGPT</b> Using ChatGPT to Create SUM, IF, VLOOKUP & INDEX-MATCH Formulas • Automating Conditional Formatting Rules • Debugging Complex Formulas with AI Assistance • Optimizing Formulas for Better Performance
1420 - 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day One

## Day 2

0730 - 0830	<b>Analyzing Data with ChatGPT</b> Summarizing Large Datasets Using AI • Extracting Key Insights from Raw Data • Automating Statistical Analysis in Excel • Using ChatGPT for Real-Time Data Interpretation
0830 - 0930	<b>Using ChatGPT for Pivot Table Automation</b> Automating Pivot Table Creation • Summarizing Data Dynamically Using ChatGPT • Generating Pivot Table Formulas with AI • Advanced Pivot Table Techniques Using AI
0930 - 0945	Break
0945 - 1100	<b>Generating Advanced Excel Charts with AI</b> Automating Chart Creation Using ChatGPT • Choosing the Right Visualization for Data • Enhancing Excel Charts with AI-Generated Insights • Creating Interactive Dashboards Using ChatGPT
1100 - 1230	<b>ChatGPT For Financial Analysis &amp; Forecasting</b> Automating Trend Analysis Using AI • Generating Financial Ratios & Metrics • Using ChatGPT for Sales & Revenue Forecasting • AI-Based Risk Analysis & Scenario Modeling
1230 - 1245	Break
1245 - 1330	<b>Generating Custom Excel Reports with ChatGPT</b> Automating Report Generation with AI • Formatting & Structuring Reports Dynamically • Extracting Key Insights for Decision-Making • Generating Executive Summaries Using AI
1330 - 1420	<b>Hands-On: Automating Data Analysis Tasks with ChatGPT</b> Generating AI-Assisted Data Summaries • Using ChatGPT to Create Pivot Tables & Charts • Automating Excel Formulas for Data Analysis • Writing AI-Generated Financial Reports
1420 - 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Two

### Day 3

0730 – 0830	<b>Basics of Excel Macros &amp; VBA</b> What are Macros & VBA? • How ChatGPT Assists in VBA Coding • Setting Up Macros for Automation • Understanding Security Concerns with Macros
0830 – 0930	<b>Generating VBA Code with ChatGPT</b> Writing Simple VBA Scripts Using AI • Debugging & Optimizing VBA Macros • Automating Repetitive Tasks Using AI-Generated Code • Customizing VBA Scripts Based on ChatGPT Responses
0930 – 0945	Break
0945 – 1100	<b>Automating Data Entry &amp; Data Processing</b> Using VBA Macros to Clean & Format Data • Automating Copy-Paste Operations with Ai • Batch Processing Large Datasets Using Ai-Generated Macros • Ai-Powered Data Validation & Error Handling
1100 – 1230	<b>ChatGPT For Advanced Excel Automation</b> Automating Email Reports from Excel • Scheduling Automated Excel Tasks with VBA • Creating Interactive Dashboards with AI-Generated Code • Generating Excel Add-Ins Using ChatGPT
1230 – 1245	Break
1245 – 1330	<b>ChatGPT For Debugging &amp; Optimizing Excel Code</b> Finding & Fixing Errors in Excel VBA • Improving Macro Performance Using AI Recommendations • Rewriting Inefficient VBA Code Using ChatGPT • Documenting VBA Projects with AI-Generated Explanations
1330 – 1420	<b>Hands-On: Creating AI-Powered Excel Macros</b> Writing a ChatGPT-Generated Macro for Data Entry Automation • Debugging & Optimizing VBA Scripts Using AI • Automating Complex Workflows with AI-Assisted Coding • Integrating VBA Macros with AI-Generated Reports
1420 – 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Three

### Day 4

0730 – 0830	<b>AI-Powered Task Automation in Excel</b> Automating Emails & Reports with AI • Using ChatGPT to Generate Excel Task Reminders • AI-Driven Workflow Management • Automating Approvals & Status Tracking
0830 – 0930	<b>ChatGPT For HR &amp; Employee Management in Excel</b> Automating Attendance Tracking with AI • Generating Employee Performance Reports • AI-Powered Scheduling & Leave Management • Streamlining Payroll Processing Using AI
0930 – 0945	Break
0945 – 1100	<b>ChatGPT For Sales &amp; Marketing Automation</b> AI-Generated Customer Insights in Excel • Automating Sales Forecasting Models • AI-Driven CRM & Lead Tracking • Using ChatGPT to Generate Marketing Reports
1100 – 1230	<b>AI For Supply Chain &amp; Inventory Management</b> Automating Inventory Tracking in Excel • AI-Powered Demand Forecasting • Optimizing Supplier Data Analysis • Creating Automated Restocking Alerts





1230 – 1245	Break
1245 – 1330	<b>ChatGPT For Customer Support &amp; Data Management</b> Automating Ticket Management Using AI • AI-Powered Sentiment Analysis for Feedback Tracking • Automating Data Entry from Customer Inquiries • Generating Customer Satisfaction Reports
1330 – 1420	<b>Hands-On: Automating a Business Workflow Using ChatGPT</b> Creating an AI-Powered Excel Template for Automation • Using ChatGPT to Generate Workflow Automation Macros • Automating Sales & Inventory Reports • Generating AI-Driven Decision-Making Insights
1420 – 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Four

## Day 5

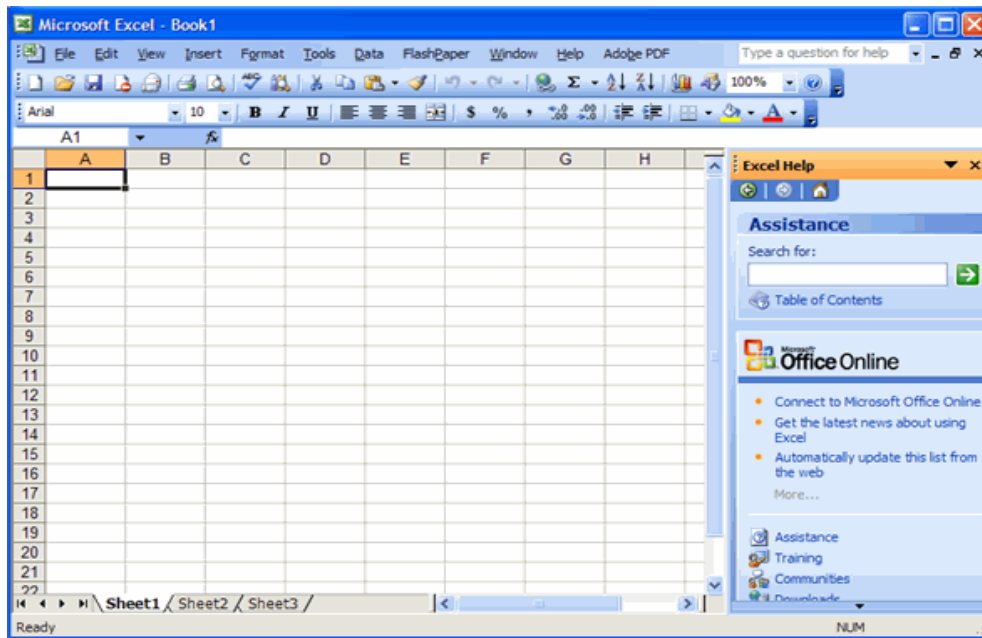
0730 – 0830	<b>Predictive Analytics in Excel with ChatGPT</b> Introduction to AI-Based Forecasting • Using Regression Models for Data Prediction • Automating Trend Detection Using AI • Implementing Predictive Analytics in Excel
0830 – 0930	<b>AI for Decision-Making &amp; Business Intelligence</b> AI-Driven KPI Analysis in Excel • Automating Financial Modeling Using ChatGPT • AI-Powered SWOT Analysis • Using ChatGPT for Competitive Analysis Reports
0930 – 0945	Break
0945 – 1100	<b>Real-World Case Studies of ChatGPT in Excel</b> AI-Driven Sales Optimization Case Study • Automating HR Analytics with ChatGPT • Financial Forecasting with AI-Powered Excel Models • AI-Powered Customer Behavior Analysis in Excel
1100 – 1230	<b>Deploying AI-Powered Excel Solutions in Business</b> Scaling AI-Driven Excel Automation • Integrating AI-Generated Excel Reports with Power BI • AI-Powered Chatbot Integration in Excel for Queries • Automating Client Reporting with ChatGPT
1230 – 1245	Break
1245 – 1315	<b>Future Trends: AI &amp; Automation in Excel</b> How AI Will Change Spreadsheet Automation • New Trends in AI-Powered Financial Modeling • Ethical Considerations in AI-Based Decision-Making • Future Updates in ChatGPT for Excel Automation
1315 – 1345	<b>Final Hands-On: Building a Full AI-Powered Excel Solution</b> Automating a Complete Business Process Using ChatGPT • Creating an Interactive AI-Powered Excel Dashboard • Generating Automated Reports & Insights • Deploying an AI-Enhanced Excel Tool for Real-World Use
1345 – 1400	<b>Course Conclusion</b> Using this Course Overview, the Instructor(s) will Brief Participants about Topics that were Covered During the Course
1400 – 1415	<b>POST-TEST</b>
1415 – 1430	Presentation of Course Certificates
1430	Lunch & End of Course





### **Simulator (Hands-on Practical Sessions)**

Practical sessions will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using “MS-Excel” application.



**MS-Excel**

### **Course Coordinator**

Mari Nakintu, Tel: +971 2 30 91 714, Email: [mari1@haward.org](mailto:mari1@haward.org)